

# Forsta Visualizations June 2026 Release



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# 1.Introduction

This document describes new and improved features in the Forsta Visualizations June 2026 Release.

If you would like to know more about these features, please contact the support team at [VisualizationsSupport@forsta.com](mailto:VisualizationsSupport@forsta.com) and they will be able to assist you.

Best Regards,  
Forsta Team



## 2.Data management

### Metadata Agent - Custom rules

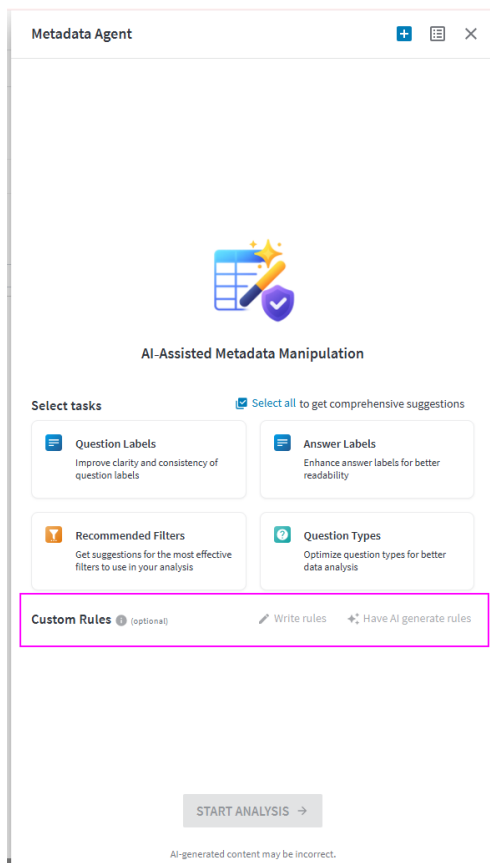
We have extended the Metadata Agent with support for Custom Rules, giving you more control over how metadata suggestions are generated within your project.

Custom Rules allow you to provide additional instructions that the Metadata Agent should follow when analyzing your metadata. This makes it possible to tailor the agent's behavior to your specific project requirements and reporting standards.

For example, you can define a rule such as:

*Only change question type from Single Choice to Scale if the question contains exactly 10 answers.*

This helps ensure that suggested changes align more closely with your organization's preferred metadata setup.

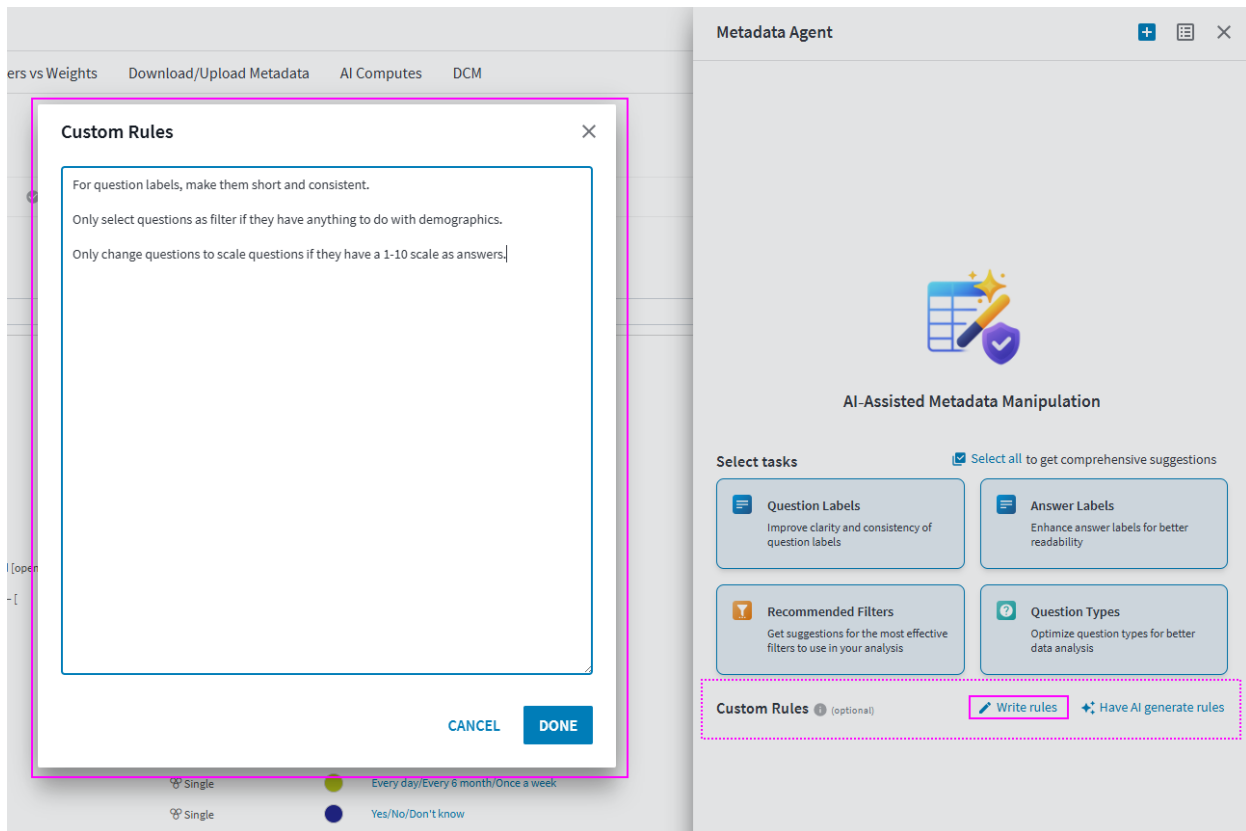


### Creating Custom Rules

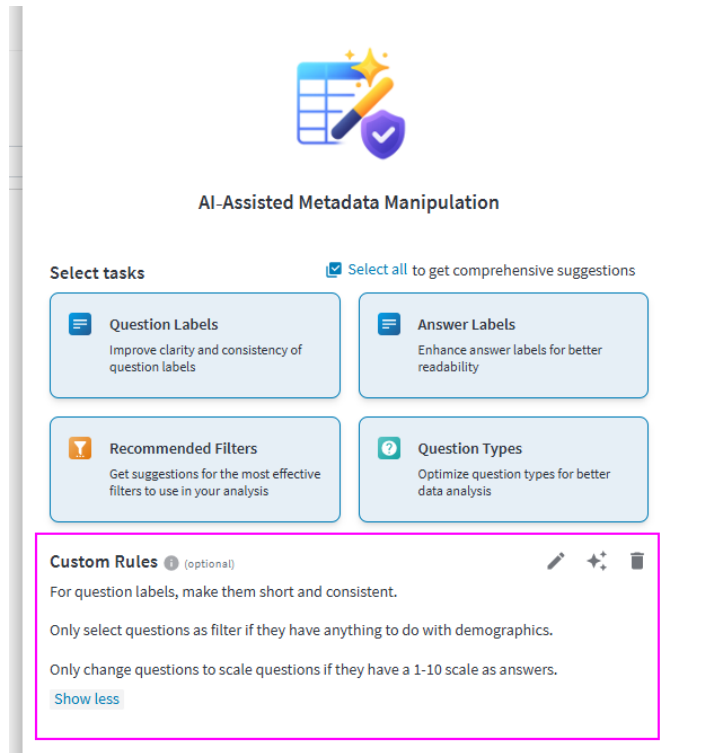
After selecting the task(s) you want the Metadata Agent to perform, you can now choose too either:

- Write your own custom rules
- Use AI to help generate custom rules
- Or continue with system prompts

Selecting the Custom Rules option opens a dialog where you can define the instructions you want the Metadata Agent to follow.



Once created, the custom rules are displayed below the selected tasks and are included as part of the analysis request.



**AI-Assisted Metadata Manipulation**

**Select tasks**  Select all to get comprehensive suggestions

- Question Labels**  
Improve clarity and consistency of question labels
- Answer Labels**  
Enhance answer labels for better readability
- Recommended Filters**  
Get suggestions for the most effective filters to use in your analysis
- Question Types**  
Optimize question types for better data analysis

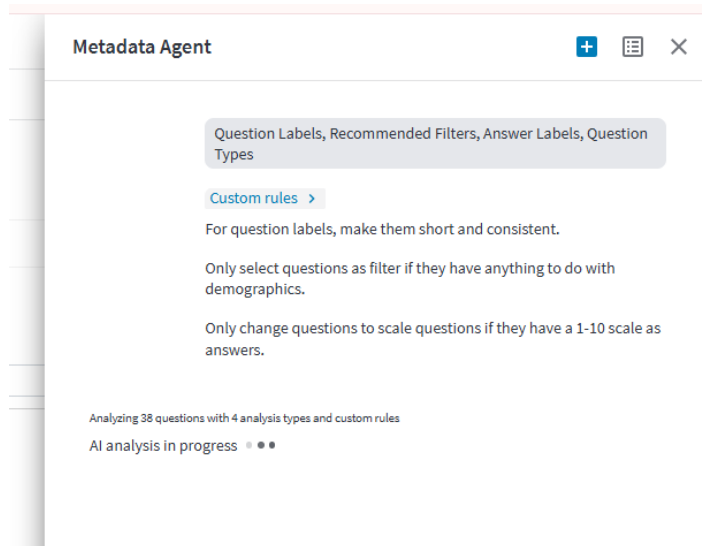
**Custom Rules** (optional)

For question labels, make them short and consistent.

Only select questions as filter if they have anything to do with demographics.

Only change questions to scale questions if they have a 1-10 scale as answers.

[Show less](#)



**Metadata Agent**

Question Labels, Recommended Filters, Answer Labels, Question Types

[Custom rules >](#)

For question labels, make them short and consistent.

Only select questions as filter if they have anything to do with demographics.

Only change questions to scale questions if they have a 1-10 scale as answers.

Analyzing 38 questions with 4 analysis types and custom rules

AI analysis in progress ●●●



### Updating Rules During Analysis

If you are not satisfied with the generated suggestions, you can modify the custom rules directly from the analysis results and rerun the Metadata Agent.

You can also adjust the selected tasks and update the custom rules before starting a new analysis, making it easier to refine the output until it matches your expectations.

The screenshot shows the 'Metadata Agent' interface. At the top, there's a title 'Metadata Agent' and some control icons. Below that, a section titled 'Question Labels' (with a count of 35) lists various labels such as 'Status | Response status (current)', 'BGCountry | Country of residence [as selected]', 'BGAge | Age of respondent (in years)', etc. At the bottom of the list, there's a 'Tasks' section with a 'Question Labels' dropdown. Below the tasks is a 'Custom Rules' section, which is highlighted with a pink box. It contains the text: 'For question labels, make them short and consistent. Do not start every word with a capital letter. Keep that only to the first word.' and a 'Show less' link. At the very bottom, there is a 'START ANALYSIS' button with a right arrow and a small disclaimer: 'AI-generated content may be incorrect.'



### Combining Changes from Multiple Analyses

When reviewing suggested changes, you are no longer limited to selecting changes from a single analysis.

You can now combine approved changes from multiple Metadata Agent analyses in the same session before saving them to your project. This makes it easier to experiment with different tasks and rule configurations while still collecting the exact set of changes you want to apply.

The screenshot displays the PG HX Platform interface. On the left, a sidebar contains navigation options: Data Sources, Variables, Hierarchy, Reports, Report Users, Events, Legacy Features, and Project Settings. The main area is titled 'Visualizations' and shows a list of questions with columns for ORDER, CODE, TEXT, TYPE, COLOR, and ANSWER BLOCK. The questions include various demographic and behavioral data points related to coffeehouse visits and brand awareness.

On the right, the 'Metadata Agent' panel is open, showing a list of filters and rules. The filters include 'Question Labels', 'Answer Labels', 'Recommended Filters', and 'Question Types'. Below this, there are sections for 'Custom rules' and 'Question Labels' with specific rules for filtering and scaling questions based on demographics and answer scales.

ORDER	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK
1		Status	Response status	Single	Finished/Unfinished/Error
2	BGCountry	Country of residence	Single	United States/Canada/France	
3	BGCity	City of residence	Single	New York/Chicago/Los Angeles	
4	BGGender	Gender	Single	Male/Female	
5	BGAge	Age of respondent	Single	19 or younger/20-29/30-39	
6	BGLik	Overall liking of coffeehouses	Single	1 hate coffeehouses/2/3	
7	BGatingOut	Coffeehouse visit frequency	Single	Daily/Few times a week/Once a week	
8	BTawarenessToM	First-mentioned coffeehouse brand	Single	Forsta Fika/Espresso Espresso/The Busy Bean	
9	BTawarenessM	Other recalled coffeehouse brands	Multi	Forsta Fika/Espresso Espresso/The Busy Bean	
10	BTrecognize	Brand recognition (listed brands)	Multi	Forsta Fika/Espresso Espresso/The Busy Bean	
11	BTfamiliarity	Brand familiarity	Multi	Forsta Fika/Espresso Espresso/The Busy Bean	
12	BTconsideration	Brand consideration	Multi	Forsta Fika/Espresso Espresso/The Busy Bean	
13	BTpreference	Preferred coffeehouse brand	Single	Forsta Fika/Espresso Espresso/The Busy Bean	
14	BTvisit	Last visit to Forsta Fika	Single	This week/Last week/3 weeks ago	
15	BTfrequency	Visit frequency - Forsta Fika	Single	Every day/Every 6 months/Once a week	
16	BTrepeatVisit	Past visit to Forsta Fika	Scale	Yes/No/Don't know	
17	ADAdAwareness	Advertising awareness for Forsta Fika	Multi	Forsta Fika/Espresso Espresso/The Busy Bean	
18	CEExperience	Experience ratings - overall experience	Scale	1 Strongly disagree/2/3	
19	CEExperienceOE	Reason for overall experience rating	Open ended		
20	CEService	Experience ratings - service quality	Scale	1 Strongly disagree/2/3	
21	CEServiceOE	Reason for service rating	Open ended		



### 3. Project administration

#### Usage report - Report Filters

The Usage Report on the Question page provides an overview of where a question is used throughout your project. This is particularly useful when making metadata changes, as it helps identify any reports or objects that may be affected.

We have now extended the Usage Report to also include Report Filters.

When viewing the usage of a question, you will now be able to see which reports use the question as a Global/Report Filter. This provides a more complete overview of question usage and makes it easier to assess the impact of planned changes before updating or deleting a question.

The screenshot shows a 'Usage report' window with a close button in the top right. The main content is titled 'Country of residence is used in the following objects'. It is divided into two sections: 'Filters' and 'Storyteller reports'. The 'Filters' section contains a table with the following data:

Report ID	Report Name	Report Type Name	Usage type
2	Overview dashboard	StoryTeller	Report Filter
3	Country specific dashboard	StoryTeller	Report Filter

To the right of this table, it says 'The question is used as a Filter.' Below the 'Filters' section is the 'Storyteller reports' section, which is titled 'The question is used in following objects' and contains a table with the following data:

Report	Object Type	Object ID
Demographics	Chart	2
Demographics	Chart	3

A 'CLOSE' button is located in the bottom right corner of the window.